

## Salesforce Case Collaborator

The Salesforce Collaborator functionality on cases in SalesForce allows users to add external or internal contacts to the case. The contacts can then stay informed of updates to the case and provide support if needed. Updates to cases can be accessed via e-mail or the Support Portal directly, and collaborators may comment on cases to which they've been added.

To add a collaborator to a case, follow the steps below:

1. Navigate to the Case that you want to add a Collaborator to using “Quick Links” button at the top of your screen.

The screenshot shows the Salesforce Case Collaborator interface for Case 00176516. The top navigation bar includes the HHAexchange logo, Home, Announcements, Quick Links (Cases), and Help Resources. A blue banner contains an update message: "Update: To improve our support process, the comment feature on updates has been removed. Comments do not trigger notifications, which can delay our response. To share additional information, under Post please click in the 'Share an Update...' text box, enter your message, and select the orange 'Share' button. This helps us respond faster and ensures your message is never missed." Below the banner, the case details are displayed: Account Name (Il Demo), Contact Name (Colby Ward), Priority (P3 - Support), Status (Closed), Sub Status (TCC - Issue Resolved), and Subject (Support Portal User Request). The interface has two tabs: DETAILS and ATTACHMENTS. The DETAILS tab is active, showing a table with case information. On the right, there is a "Post" section with a "Close Case" button and an "Add Collaborator" button. Below these buttons is a text input field labeled "Share an update..." and a "Share" button. At the bottom right, there is a search bar labeled "Search this feed..." and a "Search" button.

Case 00176516

Account Name: [Il Demo](#) Contact Name: [Colby Ward](#) Priority: P3 - Support Status: Closed Sub Status: TCC - Issue Resolved Subject: Support Portal User Request

DETAILS ATTACHMENTS

Case Number: 00176516 Case Origin: Portal Contact Name: [Colby Ward](#) Priority: P3 - Support Account Name: [Il Demo](#) Status: Closed Subject: Support Portal User Request Sub Status: TCC - Issue Resolved

Post Close Case Add Collaborator

Share an update... Share

Search this feed... Search

2. Click “Add Collaborator” and type in the state operating agency’s e-mail address. Then, click “Search”.

The screenshot shows the Salesforce Case Collaborator interface for Case 00176516, with the "Add Collaborator" form open. The top navigation bar and banner are the same as in the previous screenshot. The case details are also the same. The "Add Collaborator" form is open, showing a text input field labeled "Enter the Email of the Case Collaborator below:" with the email address "dhs.dddevv@illinois.gov" entered. Below the input field is a "Search" button.

Case 00176516

Account Name: [Il Demo](#) Contact Name: [Colby Ward](#) Priority: P3 - Support Status: Closed Sub Status: TCC - Issue Resolved Subject: Support Portal User Request

DETAILS ATTACHMENTS

Case Number: 00176516 Case Origin: Portal Contact Name: [Colby Ward](#) Priority: P3 - Support Account Name: [Il Demo](#) Status: Closed Subject: Support Portal User Request Sub Status: TCC - Issue Resolved

Post Close Case Add Collaborator

Enter the Email of the Case Collaborator below:


Email:

Search

3. Select the user you are adding to the case by selecting the radio button next to their full name and then clicking the “Next” button.


[Post](#) [Close Case](#) [Add Collaborator](#)

**Contact Results**  
1 of 1 item • 1 item selected


Full Name	Email	Account Name
<input checked="" type="radio"/> DDD EVV	 dhs.dddevv@illinois.gov	State Of Illinois, HFS

[Previous](#) [Next](#)

4. The success message will appear. Select whether you’d like to add more collaborators. If Yes, repeat process. If No, click “Next” and the workflow will be finished.
5. Collaborators will be able to view your Case using their account and navigating to Quick Links > My Collaborator Cases

 [Home](#) [Announcements](#) [Quick Links \(Cases\) ^](#) [Help Resources v](#)

**Update:** To improve our support process, the **comment feature on updates has been removed**. Comments are no longer allowed on updates, which can delay our response. To share additional information, under **Post** please click in the “**Share an Update...**” text box, enter your information, and click the “**Share**” button. This helps us respond faster and ensures your message is never missed.

 [Case](#)

My Open Cases

My Company's Open Cases

Closed Cases

My Collaborator Cases